

# CAP VOLUNTEERS

## A Growing Need

### **A kit of forms , checklists, worksheets and helpful hints for those involved with volunteer management in CAP Centres**

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## Introduction

## **What is CAP?**

CAP (Community Access Program) is an initiative of the Government of Canada, administered by Industry Canada. It offers the public affordable access to computers and the Internet, as well as the skills needed to use them. CAP centres are being set up in schools, libraries, town halls and community centres in both rural and urban communities. By the year 2001, 10,000 centres will be established across Canada. CAP promotes learning experiences in the community and offers great potential for social and economic development.

## **Why Involve Volunteers?**

Volunteers are critical to the success of CAP, because they manage the centres and provide training. They also:

- Increase/enhance the services to your clients,
- Provide a bridge between the community, your clients and your centre,
- help foster community cooperation and understanding,
- Become champions for their CAP centre,

## **Can enrich your exposure to specific communities.**

Volunteers are a valuable human resource. They offer their talent, enthusiasm, creativity and fresh perspectives.

## **What does the volunteer get?**

People volunteer for many different and individual reasons. Some of the benefits they mention most are:

- Meeting new people and making new friends,
- Exploring a career option,
- Being part of a team
- Gaining new technical skills and knowledge
- Building a resume,
- Increasing self-confidence
- Gaining work experience
- Building core skills
- Achieving a better understanding of the community
- Learning about the business world
- Feeling good about helping.

## **Where can volunteers help?**

### **Administration**

- On committee's or boards
- Managing the operations of a CAP centre
- Maintaining records of a CAP centre
- Clerical support

### **Training**

- Individuals, groups
- Internet, computer, software
- Computer Camps
- Specialized, customized

### **Technical**

- Web site Developement
- Computer maintenance
- Network troubleshooting
- Graphics

#### **Research**

- Surveys of other CAP centres
- Internet searches
- Client/Community surveys

#### **Other**

- Assisting clients with special needs, etc.

### **How to Use These Materials**

This document is not intended as an instruction manual. Rather it is more like a "toolkit"- a collection of checklists, wordings and forms which you can use to suit your own needs. If you would like more in depth explanations, rationals, sugestions etc., many excellent volunteer management books are listed in the resources sections. Some of the forms are specific to CAP centres, some are not; some were written for paid positions, but have been included because they also apply(at least in part to volunteers. Please feel free to mix and match, copy and adapt to fit your own proigram requirements.

*A volunteer program is like a garden. Look after it and it will flourish and grow. Leave it to fend for itself and it may wiother and fade away. How will your volunteer garden grow.*

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## **Planning**

### **Why bother?**

Planning is the key to success in any venture. The time you think you save here will cost you more down the road.

### **Who does it?**

A group or committee of at least two or three people

### **What needs planning?**

Decide:

• Why you want volunteers • What you want them to do • What they will need for support • Who will lead the effort \* • Who will train and support them

### **How do we start?**

• Assess your needs • Design your position descriptions • Discuss risk management issues • Formulate policies & procedures  
• Draw up a budget • Check space, supplies, supports

### **Wait!**

\* You may decide at this point that you need either a paid, or an unpaid Volunteer Coordinator. If so, read Ellis, Susan J: From the Top Down pp. 55 - 65 .Try to plan for a whole year rather than for the short term. You may discover that you only need volunteers at certain times, such as when summer students are not available or when regular staff are too busy.

## Check out:

Ellis, Susan J.; From the Top Down pp. 55 -65,  
181 McCurley & Lynch; Volunteer Management p.24  
[bigjohn.bmi.met/mba/recrui.html](http://bigjohn.bmi.met/mba/recrui.html)  
[www.charityvillage.com/charityvillage/research/rvol16.htm](http://www.charityvillage.com/charityvillage/research/rvol16.htm)

## Tools

- Committee terms of reference
- Needs assessment worksheet
- Planning calendar
- Planning checklist

*Look through the seed catalogues. Dream of your perfect garden. Plan how it will look.*

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# CAP Volunteer Management Committee — Terms of Reference

## Purpose of Program

- To provide access to, and support for people who would ordinarily not otherwise be able to use the Internet.
- Purpose of Committee
- To provide support and direction for the implementation of a volunteer program at the CAP centre.

## Duties

- Help plan the program,
- Establish a program coordinating mechanism (one individual or a small team),
- Develop a budget,
- Provide ongoing advice to coordinator(s),
- Help monitor the program and make suggestions for adjustments to it,
- Act as advocates for the program with staff, clients and the community.

## Lines of Responsibility:

- To be established as seems appropriate.

## Possible Membership

- CAP centre staff,
- One or two clients,

- A member of the community,
- Others

The coordinator is an ex-officio member. (Expertise in volunteer/program management an asset).

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## Needs Assessment and Resource Analysis Worksheet

You need to determine:

- Do we really need a volunteer program?
- How would a volunteer program relate to/impact on the CAP purpose/goals?
- Would a volunteer program be used enough to justify the costs (time, money, resources) of implementing it?

To answer these questions, work through the following tasks, remembering that the context should be limited to your volunteer program.

1. Examine the CAP purpose and objectives.
2. Describe/identify your client population.
3. Describe/list the services you will provide.
4. Analyze your resources:

a) Is there support from the "powers that be? i.e. funders/site administrators (school/library/community centre boards/management)

b) Describe the resources available to you.

Money \_\_\_\_\_

Space \_\_\_\_\_

Staff \_\_\_\_\_

Time \_\_\_\_\_

c) Describe resource shortfalls.

Money \_\_\_\_\_

Space \_\_\_\_\_

Staff \_\_\_\_\_

Time \_\_\_\_\_

5. Decide which of the gaps/shortfalls you have identified would be filled by a volunteer program.

\_\_\_\_\_

6. Identify exactly what a volunteer program would do.

\_\_\_\_\_

**\*On a calendar, fill in as many as possible of the following categories for each month:**

- staff (How many are present, needed, on holidays, courses, etc.)
- volunteer needed (To fill in for staff, to do specific volunteer activities)
- funding opportunities (Think of annual events such as school, college and university terms)
- special events (Think of Christmas, National holidays)
- notable dates (Think of birthdays, local holidays, special events)

SUGGESTED CUT BEGINS

You may find the Planning Calendar (A4) helpful for these sections



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## 12 - Month Planning Calendar

JANUARY	FEBRUARY	MARCH
• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates
APRIL	MAY	JUNE
• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates
JULY	AUGUST	SEPTEMBER
• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates
OCTOBER	NOVEMBER	DECEMBER
• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates	• staff • volunteer needed • funding opportunity • special events • notable dates

SUGGESTED CUT ENDS

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## Planning Checklist

Ask yourself the following when planning your program. You may decide some of these questions are not relevant in your situation, but at least make that decision intentionally rather than let it become an oversight!

Have we considered.....?	Yes	No
A volunteer coordinator — and who this person will be.		
Annual volunteer recognition event.		
Budget.		
Evaluation meetings.		
Formal volunteer exit interview.		

How many volunteers we'll need.		
Information storage.		
Interview and placement procedure.		
Monitoring and evaluation system.		
Necessary supplies.		
Necessary space.		
Orientation manual.		
Orientation session.		
Policies.		
Policy on volunteer involvement.		
Position descriptions.		
Probationary period for volunteers.		
Recruitment strategy.		
Reimbursement of volunteer expenses.		
Risk management issues.		
Support from the powers that be.		
System for checking references, etc.		
System for tracking volunteer hours.		
What information is needed to evaluate the program.		
When we'll need them.		
Who will do the training.		
Written volunteer/agency agreement or letter of understanding.		

It looks daunting, doesn't it? However, resist the impulse to initiate a volunteer program quickly. Operate on the principle that it's easier to do it right the first time than having to do it over again. Remember, there is something in this toolkit to help you with all the foregoing items.

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## Position Description

Title\_\_\_\_\_

Purpose\_\_\_\_\_

Duties\_\_\_\_\_

\_\_\_\_\_

Parameters of Position\_\_\_\_\_

Skills/Qualities Required\_\_\_\_\_

Lines of Responsibility\_\_\_\_\_

Time Required\_\_\_\_\_

Other Requirements (references, training, etc.)\_\_\_\_\_

Other (location, benefits, conditions, etc.)\_\_\_\_\_

## Suggested CAP Position Descriptions

On the following pages are some suggested CAP position descriptions. You are welcome to use them as they are; however, instead of simply copying them, it is much better if you use them as a model and tailor them to your centre's requirements.

You may not need all of these positions; or you may feel you need two or three people in one position to cover all the hours your centre is open; or you may want to split the duties of one person between two or more positions and adjust the requirements accordingly. You may be able to offer different benefits or "perks." Or you may simply want to change the title.

The requirement for a police record check\* has been included in each position description on the assumption that most CAP centres serve children and other vulnerable clients. If your CAP centre serves only adults, you may consider this requirement unnecessary.

One caution: as you "shuffle and deal" the items in these position descriptions to suit your own centre, be careful not to omit any information the volunteers need to know, such as the lines of responsibility, or the limits of each position. You don't want to hear a volunteer say, "I didn't realize..." at a later **Note:** These job descriptions can serve as contracts if they are signed by both the volunteers and the relevant person responsible at the centre..

\* Some police authorities will provide this service free to volunteers, others may charge a fee. If your program decides to pay this fee on behalf of your volunteers, you will need to include this cost in your budget. (Page E2)

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## Cap Volunteer Position Description

### Position Title: CAP Volunteer Coordinator

#### Purpose of Program

To provide access to, and support for people who otherwise would be unable to use the Internet. **Purpose of the Position** To coordinate the volunteer program in support of CAP goals.

#### Duties

- To undertake the recruitment, intake process, training and supervision of CAP centre volunteers,
- To schedule volunteers for their duties,
- To monitor volunteers on a regular basis and handle any problems which may arise,
- To keep staff (and board) informed of volunteer issues,
- To assist with volunteer evaluations,
- To ensure that volunteers understand and adhere to centre policies and procedures,
- To keep appropriate records of volunteer involvement,
- To help create a warm, positive environment at the centre,
- To ensure appropriate records are kept by the volunteers.

#### Requirements

Good communication and interpersonal skills,  
Leadership ability,

Excellent organizational skills,  
Interest in community based activities,  
Some background in teaching/training an asset,  
Police record check and three references.

## Parameters

Must comply with all policies and procedures around screening and risk management, including a probationary period,  
Involvement with clients of the centre outside the parameters of the program are not sanctioned by the program,  
Does not need to be present whenever CAP is operating and volunteers are present, but must be available to visit on a regular basis.  
Times

Approximately \_\_\_\_\_ hours per week. Position runs from \_\_\_\_\_ to \_\_\_\_\_

Lines of Responsibility

To: \_\_\_\_\_

Who can be reached at: \_\_\_\_\_

Other

Out of pocket expenses provided.

Centre will pay for volunteer management training.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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## Cap Volunteer Position Description

Position Title:

CAP Computer/Internet Tutor

Purpose of Program

To provide access to, and support for people who otherwise would be unable to use the Internet. Purpose of the Position

To tutor and/or assist clients of the CAP centre in proper computer and Internet use, in support of CAP goals

Duties

To meet with clients at an appropriate time for tutoring,

To assist clients with computer/Internet related questions,

To adhere to centre policies & procedures as outlined by coordinator and volunteer manual..

Requirements

Competence in use of computer, Internet, hardware, software,

Reliability & punctuality,

Ability to work with minimal supervision,

Willingness & ability to teach technical skills to "non-Net techies,"

Knowledge of the following an asset:

Computer set up & maintenance, Software & hardware installation,

Network troubleshooting,

Police record check and three references.

## Parameters

Must comply with all policies and procedures around screening and risk management, including probationary period,  
Involvement with clients of the centre outside the parameters of the program is not sanctioned by the program,  
Must be available on a regular basis when CAP is operating.

## Times

Approximately \_\_\_\_\_ hours per week.

Position runs from \_\_\_\_\_ to \_\_\_\_\_

Lines of Responsibility To:

Who can be reached at: \_\_\_\_\_

Other

- Out of pocket expenses provided

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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## Cap Volunteer Position Description

Position Title: CAP Program Manager

Purpose of Program To provide access to, and support for people who would otherwise be unable to use the Internet.

Purpose of the Position To oversee the operations and manage the programs of the CAP centre.

## Duties

To liaise with coordinator and staff as necessary,  
To undertake surveys of clients, staff & volunteers as appropriate,  
To ensure centre policies and procedures are adhered to,  
To maintain appropriate records as identified by CAP centre,  
To provide clerical support to CAP centre,  
To collect fees from CAP centre clients,  
To assist Board/Committee with planning/developing new programs.

## Requirements

Excellent organizational & administration skills,  
Interest in community based activities,  
Ability to work under pressure & deal with diverse problems,  
Ability to work independently as well as part of a team,  
The following assets desired, but not essential:  
familiarity with computers, experience in program or facility management,  
Police record check and three references.

## Parameters

Must comply with all policies and procedures around screening and risk management, including probationary period.  
Involvement with clients of the centre outside the parameters of the program is not sanctioned by the program.

Must be available during hours when CAP centre is operating.

## Times

Approximately \_\_\_\_\_ hours per week.

Position runs from \_\_\_\_\_ to \_\_\_\_\_

## Lines of Responsibility

To: \_\_\_\_\_ Who can be reached at \_\_\_\_\_

Other \_\_\_\_\_

Out of pocket expenses provided \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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## Cap Volunteer Position Description

**Position Title: CAP Centre Custodian**

### Purpose of Program

To provide access to, and support for people who would otherwise be unable to use the Internet. Purpose of the Position  
To manage the operation of the CAP centre.

### Duties

To ensure space and equipment is ready for opening CAP centre,  
To open and close the CAP centre,  
To answer questions from the public about the CAP centre,  
To adhere to centre policies and procedures,  
To maintain appropriate records as identified by CAP centre,  
To assist CAP centre manager as needed,  
To answer telephone calls concerning CAP activities.

### Requirements

Reliability and punctuality,  
Good communication skills,  
Interest in community based activities,  
Police record check and three references.

### Parameters

Must comply with all policies and procedures around screening and risk management, including probationary period,  
Involvement with clients of the centre outside the parameters of the program is not sanctioned by the program,  
Must be available during hours when CAP centre is operating.

## Times

Approximately \_\_\_\_\_ hours \_\_\_\_\_ per week.

Position runs from \_\_\_\_\_ to \_\_\_\_\_

### **Lines of Responsibility**

To: \_\_\_\_\_ Who can be reached at: \_\_\_\_\_

### **Other**

- Out of pocket expenses provided

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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## **Cap Volunteer Position Description**

### **Position Title**

**CAP Centre Marketing/Fund Raising Coordinator**

### **Purpose of Program**

To provide access to, and support for people who would otherwise be unable to use the Internet.

### **Purpose of Position**

To promote the CAP centre in the community and raise funds for CAP activities.

### **Duties**

To promote the CAP centre in the community and market its services,  
To organize information fairs and fund raising activities,  
To undertake surveys of clients & community and maintain records of same,  
To develop publicity material,  
To liaise with local media,  
To inform public about Internet as a potential source of information, resources and services,  
To offer training in Internet related services to local business & organizations,  
To research and develop CAP centre Web page (in consultation with CAP centre technician).

### **Requirements**

Excellent communication & presentation skills,  
Interest in community based activities,  
Ability to work independently,  
Enthusiasm and creativity,  
Competence in computer/Internet use,  
Police record check and three references.

### **Parameters**

Must comply with all policies and procedures around screening and risk management, including probationary period.

Involvement with clients of the centre outside the parameters of the program are not sanctioned by the program.

## Times

Approximately \_\_\_\_\_ hours \_\_\_\_\_ per week.

Will vary according to current promotional & fundraising activities.

Position runs from \_\_\_\_\_ to \_\_\_\_\_

## Lines of Responsibility

To: \_\_\_\_\_ Who can be reached at: \_\_\_\_\_

## Other

- Out of pocket expenses provided

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_

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## Cap Volunteer Position Description

**Position Title: CAP Centre Technician**

### Purpose of Program

To provide access to, and support for people who would otherwise be unable to use the Internet.

### Purpose of Position

To provide technical assistance to CAP centre clients, volunteers, staff and programs.

### Duties

To ensure hardware and software is in working order,  
To inform CAP the centre manager of any equipment that requires maintenance,  
To provide technical support to CAP centre (setting up, maintenance, troubleshooting, etc.),  
To research Internet service providers to ensure that the CAP centre is best served,  
To design and maintain the CAP centre Web page (in consultation with CAP centre marketing coordinator),  
To help clients develop Web pages.

### Requirements

Excellent computer, Internet, hardware, software knowledge,  
Computer set up & maintenance skills,  
Ability to work with minimal supervision,  
Skills in Web page design and maintenance,  
Police record check and three references.

### Parameters



Must comply with all policies and procedures around screening and risk management, including probationary period, Involvement with clients of the centre outside the parameters of the program are not sanctioned by the program, Should be available at CAP centre opening and on call during operating hours.

### **Times**

Approximately \_\_\_\_\_ hours per week.  
Position runs from \_\_\_\_\_ to \_\_\_\_\_

### **Lines of Responsibility**

To: \_\_\_\_\_ Who \_\_\_\_\_ can be reached at:

### **Other**

Out of pocket expenses will be provided  
Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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## **What is it?**

- Recognizing potential dangers
- Putting measures in place to prevent them
- Minimizing the damage they could cause.

## **Why Bother?**

It can happen to you  
You can be held legally responsible  
Insurance provides money, but does not wipe out bad publicity or shaken faith  
We have a moral responsibility to our clients

## **Risk Management/Screening**

### **Where do we begin?**

- Identify possible risks and assess them
- Decide how to control your risks by: - eliminating the activity - minimizing the risk - transferring the risk
- Write policies
- Let your policies be known
- Abide by your policies

## **Who should we screen**

Everyone.

- Don't assume people are OK because you already "know them."
- Apply a consistent approach, so that no one feels singled out.
- You are preventing abuse or theft, not scaring people away

## Checkout

CAP Cybercamp Handbook Ellis, Susan J.: From the Top Down , p 137 McCurley & Lynch: Volunteer Management, pp.143-148 Tremper & Kostin: No Surprises, pp.2-10, 27 Volunteer Canada: Screening Handbook [www.volunteer.ca](http://www.volunteer.ca) [www.cybervpn.com/index.htm](http://www.cybervpn.com/index.htm) [bigjohn.bmi.net/mba/recrui.html](http://bigjohn.bmi.net/mba/recrui.html) [www.ptialaska.net/\\_jdewitt/vlh/RiskMgt.html](http://www.ptialaska.net/_jdewitt/vlh/RiskMgt.html) [cap.ic.gc.ca/ccweac/handbook/.html](http://cap.ic.gc.ca/ccweac/handbook/.html) [www.energizeinc.com/art.html](http://www.energizeinc.com/art.html)

## Tools

- Overview chart
- Risk identification worksheet
- Planning worksheet
- Safe Steps
- Confidentiality agreement

Don't buy the first packet of seeds with a nice picture -read the back . Will they grow in your climate ?

C 1

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## Identification of Risks Worksheet

- Use this worksheet to consider the risks involved in each volunteer position.
- Consider possible risks or problems that might arise in each of the categories below.

### Physical Ability:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Skills

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Maturity:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Equipment Use:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Work site:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Clients:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Failure to Follow Procedures:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Source: McCurley & Lynch: Volunteer Management (Heritage Arts 1996)

C 3

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## **Risk Management Planning Worksheet**

**Volunteer Position:**

**Major Risks of this Position:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Special Measures to be Undertaken in Screening for this Position:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Special Measures to be Undertaken in Training for this Position:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Special Measures to be Undertaken in Supervision of Volunteers in Position:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Source: McCurley & Lynch: Volunteer Management (Heritage Arts 1996)

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## Safe Steps

Determine the risk.

Write clear position descriptions.

Have a formal recruitment process.

Use an application form.

Conduct interviews.

Check references & qualifications.

When appropriate, request a police record check.

Give orientation & training.

Apply probationary period.

Supervise.

Do performance evaluations.

Follow up with volunteers and clients.

Adapted from "10 Safe Steps:" The Volunteer Screening Program of Volunteer Canada's National Education Campaign.

For more information, contact your local volunteer centre or Volunteer Canada at 1-800-670-0401 or visit [www.volunteer.ca](http://www.volunteer.ca)

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## Sample

### Confidentiality Agreement

I, \_\_\_\_\_, as a condition of my volunteer involvement at the CAP center, agree and pledge not to reveal any information about clients, staff or volunteers that I may obtain or receive in the performance of my duties, or otherwise, at the centre.

I further agree to respect the confidentiality of any personal documents, reports or other writing to which I may have access at the centre.

Dated at \_\_\_\_\_ on the day of \_\_\_\_\_, 2000

Witness: \_\_\_\_\_ Volunteer: \_\_\_\_\_

C6

## Policies:

### Why Bother?

- Create consistency so everyone reacts similarly
- Support unpleasant requirements (like criminal checks or firing)
- Are a valuable orientation/training tool
- Strengthen your defense if sued
- Prevent and/or help solve problems

## When Do We Need Them?

- To minimize risk
- To spell out values and beliefs

## How Do We Write Them?

- They should sound like a command
- Use present tense
- Use active rather than passive voice

## About What?

Some suggestions:

- Value of volunteer involvement screening
- Behaviour/language
- Harassment/discrimination/abuse
- Confidentiality
- Emergency situations
- Equipment mishandling

## Checkout:

Graff, Linda L: by Definition p 20, pp. 67,72- 76 McCurley & Lynch: Volunteer Management p 23, pp. 195 - 202 Tremper & Kostin: No Surprises pp. 10 - 20 Vineyard & McCurley: Managing Volunteer Diversity p.7 VIVE - Volunteers Involving Volunteers Effectively, Res. Sh. 11,12 cap.ic.gc.ca/ bigjohn.bmi.net/mba/recrui.html www.energizeinc.com/ www.casnet.org/nuts/volunteer\_management/manage.htm www.cybervpm.com/

## Tools

- Sample policy statements
- Sources of other samples
- Blank form

D 1

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## A Few Sample Policies

### Risk Management

The CAP centre is committed to practicing effective risk management to protect the safety, dignity and legal rights of others, as well as our human, financial and intangible assets.

## **Criminal Records Check**

Volunteers must obtain a police record check as appropriate for the protection of clients. Volunteers who do not agree to do this check may be refused assignment. Access to CAP Property & Materials Volunteers shall have access to centre property and materials necessary to fulfil their duties, and shall receive training in the operation of any such equipment. Property and materials shall be used only when directly required for CAP purposes, and shall not be removed from the site.

## **Insurance**

Liability and accident insurance is (is not) provided for all volunteers engaged in CAP business.

## **Confidentiality**

Volunteers are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving as a volunteer, whether this information involves a single staff member, volunteer, client or other person; or involves overall site business.

## **Work site**

An appropriate work site shall be established prior to the recruitment of any volunteer. This work site shall contain necessary facilities, equipment and space to enable volunteers to perform their duties effectively and comfortably.

## **Dress (Behaviour, Language) Code**

As representatives of the CAP centre, volunteers are responsible for presenting a good image. Volunteers shall dress, behave and use language appropriately for the conditions and performance of their duties.

D2

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## **Sources of Other Sample Policy Wordings**

- Volunteer Involvement  
McCurley & Lynch: Volunteer Management p195
- Criminal Record Check  
McCurley & Lynch: Volunteer Management p 197
- NETiquette Protocols Agreement  
cap.ic.gc.ca/ Screening Street,
- Lorraine: Screening Handbook - National Education Campaign on Screening Volunteers and Staff Insurance  
McCurley & Lynch: Volunteer Management p 201
- Work Site  
McCurley & Lynch: Volunteer Management p 197
- Orientation  
McCurley & Lynch: Volunteer Management p 198
- Confidentiality  
Graff, Linda L:By Definition p 33

- Harassment  
Graff, Linda L: By Definition p 32
  - Discrimination  
Graff, Linda L: By Definition p 43
  - Diversity  
Vineyard & McCurley: Managing Volunteer Diversity p 7
- D 3  
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## Policy Writing Form

Subject	Policy#
---------	---------

Original      Revision

### Policy Statement

Procedures

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

Distribution	Date
--------------	------

D4  
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## Budget

**Your volunteer program will incur costs that should receive attention in your budget discussions.**

Possible costs:

- Staffing
- Advertising
- Orientation materials
- See for trainer
- Recognition items
- Special events
- Out of pocket expenses
- Space
- Software
- Telephone
- Insurance Budget
- Keep track of actual costs, even if they are counted elsewhere.

- Always show dollar value of volunteer time in project budgets (hours x average wage).

## Check Out

Ellis, Susan J.: From the Top Down, pp. 33-50 Tremper & Kostin: No Surprises, pp. 36 - 40

- Budget form
- Value of volunteer worksheet

***Don't plant your seeds until you're sure you can afford the food and water!***

E 1

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## Budget Projected Actual Personnel Coordinator

	Budget	
	Projected	Actual
Personnel		
Coordinator		
Trainer honoraria		
Secretarial		
Sub Total		
Operation		
Rent		
Telephone		
Advertising		
Materials		
Out of pocket expenses		
Recognition items		
Software		
Special Events		
Training		
Fundraising Costs		
*Computer Maintenance		
*Computer Hardware		
* Internet Access		
Sub Total		
GRAND TOTAL		

\* This would probably not come under the volunteer program, but the program may be required to contribute.

Note: You may also need to include fees for police record checks - see page B4



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## True Dollar Value of Volunteers Worksheet\*

Volunteer Position Title: \_\_\_\_\_

Equivalent Salaried Job Title: \_\_\_\_\_

Annual Salary for Equivalent Job: \$ \_\_\_\_\_ (A)

OR

Provincial Average Salary (see page E4) \$ \_\_\_\_\_ (A)

Benefits - 15% of (A) \$ \_\_\_\_\_ (B)

Salary + Benefits (A + B) (TOTAL COMPENSATION) \$ \_\_\_\_\_ (C)

Annual work hours for job (hrs per week x 52) hours \_\_\_\_\_ (D)

(C) divided by (D) = TRUE DOLLAR VALUE OF EACH HOUR OF VOLUNTEER TIME IN THIS POSITION  
\$ \_\_\_\_\_ \*\*

\*Adapted from Ellis, Susan J.: From the Top Down (EnergizeInc., 1996)

\*\* Always useful information to have for budgets, proposals, fundraising etc.

E 3

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## Provincial Average Earnings

Average Yearly Salary Average Hourly Pay (Based on 40 hr. week)		
Newfoundland	\$28,271.36	\$13.59
P.E.I.	\$24,962.08	\$12.00
Nova Scotia	\$27,013.48	\$12.99
New Brunswick	\$28,194.92	\$13.56
Ontario	\$34,263.32	\$16.47
Manitoba	\$28,382.12	\$13.65
Saskatchewan	\$28,546.96	\$13.72
Alberta	\$32,791.72	\$15.77
British Columbia	\$32,654.44	\$15.70

--	--	--

These figures were calculated using the average weekly earnings for November 1999, as provided by Statistics Canada. For more details, visit their Web Site at [www.statcan.ca](http://www.statcan.ca)

E4

## Recruitment

- Person to person (individually)
  - Group contact (presentation)
  - Media: newspaper, radio, local TV
  - Volunteer centre
  - Other: bumper stickers, brochures, flyers, posters, displays at fairs & shopping locations, open house, Internet, (VOE)
- public recognition of current volunteers, partnerships with businesses
- Showing people how and where they can do what they want to
  - Identifying people for service
  - Asking them to volunteer, not persuading them
  - Selling the value of involvement
  - Convincing people of the benefits
  - Showing how centre & individual needs can be matched & met Recruitment
  - Do targeted, rather than general recruiting if possible.
  - When identifying your targets, don't assume certain groups won't be interested.
  - Most people can get involved at some level.
  - Seniors, for example, may welcome the opportunity to get involved by keeping records, fund raising, answering the phone, in exchange for the chance to learn about computers, even if they may lack computer skills at first.

## Where to try Virtual suggestions

### VOE Guidelines for ads

#### Sample ad

Have a year-round plan:

- Late September and January. (community adults)
- Late spring (students)
- September and January (schools)
- Fall and January. (university)

## Look where you're going

### Places/Groups to Find Volunteers

NOTE: Some of the following apply only to rural settings, and some only to urban centres. Many apply to both.

- Arts & culture organizations.
- Associations of retired people.
- Business/service club newsletters.
- Church bulletins.
- Community service/work term programs\*.
- Community education classes in computers.
- Computer store/services.

- Environmentalists.
- Farmers/fishers.
- Health care workers.
- Immigrants.
- Labour unions.
- Leisure/fitness facilities/groups.
- Local Volunteer Centre/Bureau.
- Newspapers.
- Online (see below).
- Own web page.
- Political organizations.
- Professional associations.
- PTA.
- Religious groups.
- School newspaper.
- School Co-op program\*.
- Schools/colleges/universities.
- Self-help organizations.
- Seniors.
- Service groups.
- Single parents.
- Small business
- Social workers.
- Special needs groups.
- Town hall/post office/library.
- Volunteer hotlines.
- Women's groups.
- Your family.
- Youth groups.

\* Not actually volunteers. Be aware that you will have less autonomy with these placements You will have to conform to the program's supervision and evaluation requirements rather than your own. The "volunteers" may also have divided loyalties, feeling a greater affiliation to their program than to your centre.

Don't overlook Virtual Volunteers and shared volunteers! Virtual volunteering means volunteer tasks completed in whole or in part via the Internet at a home or work computer. They are also called online volunteering or cyberservice. This approach allows you to expand the benefits of your volunteer program, allow more volunteers to participate, and make use of volunteers in new areas. Many people prefer to volunteer via home or work computers because of time constraints, personal preference, a disability or home-based obligations. Virtual Volunteering allows people to contribute time and expertise from their own desks. In this way, volunteers can be shared among many groups across the country.

### **To learn more, check out:**

<http://www.cybervpn.com/index.htm>

<http://www.serviceleader.org/vv/index.html>

<http://www.txserve.org/mgmt/volrec/ident.html>

<http://www.impactonline.org/services>

To advertise online:<http://www.voe-reb.org> local volunteer centre

F 2

## **Suggested Tasks for Virtual Volunteering**

### **Research**

- Find information to use in grant proposals or newsletter.
- Gather web site addresses of other CAP centres.
- Use online phone books and web sites to update contact information.
- Undertake regular searches for relevant news articles.

## **Public Relations**

- Post information to appropriate online communities.
- Design centre newsletter or brochure.
- Proofread drafts of paper and online publications.
- Write articles for brochures, newsletters, web site.
- Design logo for centre or filling illustration needs.

## **Volunteer Management**

- Manage other virtual volunteers.
- Provide online orientation to all volunteers with Internet access.
- Survey volunteers by e-mail about their experiences with centre.
- Keep track of volunteer hours.
- Input volunteer opportunities into online databanks.
- Provide online mentoring and instruction.

## **Technical Support**

- Provide multimedia expertise such as preparing computer-based presentation (PowerPoint, Hypercard etc.).
- Design database system using centre's in-house database software.
- Provide advanced Web site programming (creating automated forms, interactive areas etc.).
- For more ideas, visit <http://www.serviceleader.org/vv/examples.html>

F3

## **The Volunteer Opportunities Exchange (VOE)**

The VOE connects agencies looking for volunteers with people looking for volunteer opportunities.

Agencies looking for volunteers create profiles of positions they wish to fill based on skills, interests and geographic location. Volunteers seeking positions create similar profiles. VOE then uses this information to match the opportunities with the volunteers.

The VOE has a database with over 25,000 position titles linked to over 500 categories to match opportunities with volunteers precisely.

To find out more information visit the VOE Web site at <http://www.voe-reb.org>, or contact your local volunteer centre, or Volunteer Canada at 1-800-670-0401.

## **Volunteer Centres**

The role of a volunteer centre in a community is to promote and support volunteerism. Your local volunteer centre can assist you with recruitment, help you develop your recruitment efforts and link you to the Volunteer Opportunities Exchange (VOE).

For a list of local volunteer centres, contact

Volunteer Canada

430 Gilmour Street  
Ottawa, Ontario K2P 0R8  
Tel: (613) 231-4371 Toll-free: 1-800-670-0401  
Fax: (613) 231-6725  
E-mail: [volunteer.canada@sympatico.ca](mailto:volunteer.canada@sympatico.ca)  
Web: <http://www.volunteer.ca>

F4

## Writing an Ad

Be sure to list what the volunteer will get back. This should include not only the tangible benefits, but also that volunteering will meet their need to be part of the community, to help, to get recognition, to feel useful, to learn, to reduce loneliness.

1. Answer the question, "Why should I volunteer for you as opposed to you us?"
2. Answer all the typical questions such as, "What will I be doing? How often? When? Where?"
3. Reassure people that they will be trained and supported.
4. Avoid words like "desperate" or "need" that scare people away, or send the message that you'll accept anyone.
5. Be honest.
6. Include any restrictions (e.g. police record checks).
7. Ask for help, but don't plead. You want volunteers who want to be there.

## Pattern for Recruitment Ad

Ad (Motivational appeal) BY (task) FOR (persons or goal) FOR (time required) IN/AT (location) (reward) TRAINING PROVIDED (required/qualification) FOR MORE INFORMATION, CALL (contact name) AT (agency/program) AT (phone #)

\* Motivational appeal: "You can help your neighbours, or brighten someone's horizon, or help someone start a small business, or help a relative or a friend find a job."

\* Task: "Teaching people to use a computer, or surf the net, or create a web page."

\* Reward: "Having fun, expanding your own skills and knowledge, gaining access to the Internet, gaining training and work experience."

\* Adapt these phrases to the people to whom you are aiming your advertizing. Think of yourself as a youth, senior, member of a church group, and ask yourself what would be most appealing.

## Sample Advertizement:

Have fun while you help others to learn! You can enlarge someone's world by teaching them how to surf the net at your local CAP centre.(located in the Town Library) It only takes two hours of your time, one evening per week. For more information, call Jane Doe at 555-5555

Source: CyberVPM.com Resources for Volunteers Programs or [www.cybervpm.com/](http://www.cybervpm.com/)

F5

## Intake Placement Why Bother?

Four concerns expressed by many volunteers:

- The work will be a waste of my time
- My skills and talents will not be used appropriately
- I may be placed in positions for which I am not suited
- I may be asked for more than I have time for

Good placement addresses all these concerns

## What Does It Do?

- Shows volunteers that you take the project and their time seriously.
- Helps get the right person in the right position
- it can prevent problems

## Where Do We Start

Application (or registration) is the first chance you have to learn about your volunteer.  
You may have to screen some out at this point.

## Checkout

[http://www.ptialaska.net/\\_jdewitt/vlh/VLHRiskMgt.html](http://www.ptialaska.net/_jdewitt/vlh/VLHRiskMgt.html)

## Tools

Blank application form

***You place your trees, plants and flowers where they can flourish and do the most good - shade where you need it, colour where it brightens the view etc.***

***Take the time to discover where your volunteers will bloom and grow !***

G1

## Volunteer Application Form

For Position of (if known) \_\_\_\_\_

Name\_\_\_\_\_

Address \_\_\_\_\_

Telephone (W) \_\_\_\_\_ (H) \_\_\_\_\_

Current Status (school, university, work, retired, at home) \_\_\_\_\_

In case of emergency, contact \_\_\_\_\_

Telephone \_\_\_\_\_

Education \_\_\_\_\_

Work Experience \_\_\_\_\_

How many hours per week would you be available? \_\_\_\_\_

For how many weeks could you commit those hours? \_\_\_\_\_

What times of the day are you available? \_\_\_\_\_

What type of volunteering you would like to do? \_\_\_\_\_  
\_\_\_\_\_

Do you have any experience/skill/interest you consider relevant for this work? \_\_\_\_\_  
\_\_\_\_\_

What do you hope to gain from volunteering? \_\_\_\_\_  
\_\_\_\_\_

Please list three referees (at least one of whom should be able to write or speak about your work, or studies, or previous volunteering). Please include addresses and telephone numbers, and inform your referees that we will contact them

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

We may also contact other people, whom you have not listed, about your suitability to volunteer with us.

Do you have any objection to this?

Yes \_\_\_\_\_

No \_\_\_\_\_

Comments \_\_\_\_\_  
\_\_\_\_\_

G3

## Interview

Note the interviewee's appearance, interaction with interviewer, strengths, weaknesses

Note your own overall impression

Interviewing with another person is often helpful

If you feel uncomfortable interviewing a person you know well from the community or work/school, inviting him or her to have a conversation "for the purpose of explaining the program and establishing if the role is right for you.

" McCurley & Lynch - Volunteer Management pp. 53 -62 Tremper & Kostin - No Surprises p. 25 Wilson, Marlene - Effective Management pp. 121 - 133

[www.cybervpm.com](http://www.cybervpm.com)

[www.volunteertoday.com/recrui.html](http://www.volunteertoday.com/recrui.html)

[www.ci.sat.tx.us/planning/handbook/vanilla.htm](http://www.ci.sat.tx.us/planning/handbook/vanilla.htm)

[www.energizeinc.com/](http://www.energizeinc.com/)

## Tools

Suggested interview techniques Interview tips and common mistakes

Suggested interview questions Sample interview form

Blank interview form sample letter of acceptance

***Keep checking - will these seeds grow in your soil? Will they provide what you need?***

H1

## Interview Technique

- Use open-ended questions that do not ask for yes/no answers.
- Play back or paraphrase.
- Repeat what the prospective volunteer has said using your own words to clarify what you have understood, then wait for confirmation that you got it right.
- Attend. Use eye contact, an attentive posture and occasional nods to show you are listening.
- Use prepared questions, so that each volunteer gets an the same chance, and you can make fair comparisons.
- Use hypothetical situations from your centre, asking "What would you do if...?"
- Express concerns of previous volunteers and how you responded. This can stimulate questions and concerns -- provided you do not indirectly suggest that you've heard all possible concerns.

## Interview Tips & Common Mistakes

- Make sure interview site is comfortable and accessible.
- Structure your interview. (Set the stage, state who you are, what you will ask, how the interview will be conducted.)
- Be sure you leave time for giving information as well as getting information.
- Make sure you are not interrupted.
- Answer questions honestly.
- Evaluate each volunteer individually.

## Don'ts



- Don't ask about: age, sex, race, religion, marital status, sexual orientation, children, disabilities. (see Human Rights Code)\*
- Don't promise what you can't deliver.
- Don't stereotype or make assumptions.
- Don't misread messages. If you are unsure what someone is saying, play back what they said, starting, "Are you saying...?"
- Don't rush. Leave ample time for the interviewee's questions
- Don't ignore your intuition, but check it out with careful questioning.
- Don't waste time.
- Don't get deflected into talking about yourself, your opinions, your experiences at the Centre
- Don't talk too much. You aren't the one being interviewed.

## Check Out

See McCurley & Lynch: Volunteer Management for excellent tips on conducting an interview including set-up, closing, etc  
. \* Varies from province to province

### H 2

#### Sample Interview Questions

1. What have you enjoyed most/least in previous assignments?
2. What kind of people do you work with best?
3. Are there types of people you feel you would be unable to work with?
4. What would you consider an ideal volunteer position for you?
5. What things have you done that have given you greatest satisfaction?
6. Why are you interested in volunteering?
7. What are your long-range objectives?
8. What do you do in your leisure time?
9. How would you describe your work habits?
10. What are the most significant decisions you have made in your life, and how do you feel about them?
11. What makes you really angry at work? At home? How do you deal with this anger?
12. Describe your temperament. What you like about yourself? What would you like to improve?
13. How do you see this position fitting with your personal goals?
14. What do you know about CAP? Our centre?
15. What training would make you feel comfortable working here?
16. Do you have transportation to the centre?

## SAMPLE

### Volunteer Interview Record Interviewer:

Date: \_\_\_\_\_

Name of Volunteer: \_\_\_\_\_

Phone: \_\_\_\_\_

I. Review of Enrollment Form Review and clarify information on Volunteer Enrollment Form. Correct any misinformation on form and place other comments below.

### II. Non-Directive Interview Questions

1. What attracted you to our agency?

Is there any aspect of our work that most motivates you to seek to volunteer here?

2. What would you like to get out of volunteering here? What would make you feel like you've been successful?

3. What have you enjoyed most about your previous volunteer work? About previous paid employment?

4. Describe your ideal supervisor. What sort of supervisory style do you prefer to work under?

5. Would you rather work on your own, with a group, or with a partner? Why?

6. What skills do you feel you have to contribute?

7. What can I tell you about our agency?

H 4

### III. Match with Volunteer Positions

Discuss potential volunteer positions and check match of interests, qualifications, and availability.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

To be completed after interview IV.

### Interviewer Assessment Appearance:

Poised, neat

Acceptable

Unkempt

### Reactions to Questions:

Helpful, interested, volunteered information

Answers questions

Evasive

Confused

### Disposition:

Outgoing, pleasant, confident

Reserved

Withdrawn ,moody

Suspicious, antagonistic

### Interpersonal Skills:

Adept at dealing with others

Relatively at ease with others

Uncomfortable

Physical Restrictions: \_\_\_\_\_  
\_\_\_\_\_

#### V. Recommended Action

Consider for following positions:

1. \_\_\_\_\_

2. \_\_\_\_\_.

Schedule for second interview with \_\_\_\_\_

Hold in reserve for position of:

1. \_\_\_\_\_

2. \_\_\_\_\_

Investigate further: \_\_\_\_\_

Refer to: \_\_\_\_\_

Not suitable for agency at this time \_\_\_\_\_ -

Source: McCurley & Lynch: Volunteer Management (Heritage Arts 1996)

H 5

## Interview Form

Position Title

Applicant's Name

Rating scale: Excellent (5) Good (4) Average (3) Below (1-2)

Ability to communicate ideas	
Ability to understand questions	
Response to questions	
Qualities required	
Skills required	
Attitude, manner, interest	

Overall	

References Contacted

Name

Comments

Interviewer's Comments and Recommendation

H6

## Sample Letter of Acceptance

Dear

I am pleased to inform you that you have been accepted as a CAP volunteer for a period of (1 year/6 months/3 months) in the position of , subject to a successful probationary period

You will be supervised by who will also assist in your orientation and training. S/he will be responsible for responding to your requests for assistance.

Please call your supervisor at your earliest convenience and schedule an appointment. Your orientation date will be decided at that time.

Congratulations. We are pleased to have you join us as a volunteer at the CAP centre. We hope that you will benefit from your contribution to our services. We place a high value on our volunteer contribution. Thank you for caring enough to share your time and talents with your community.

Yours sincerely

H7

## Reference Check

### Who?

Everyone you are considering as a volunteer

### Why?

About 33 % either lie or misrepresent themselves on their resumes

### What?

- Check references
- Use police record checks
- Check qualifications

### How?

- Prepare a list of questions
- Have a release form signed
- Have a standardized reference check form so everyone is asked the same questions
- Be aware of the limitations of police record checks
- Don't make exceptions

## Check Out

Tremper & Kostin No Surprises pp. 25- 27

Grensing, Lynn - Employee Selection pp. 72 - 80

<http://www.cybervpm.resources.com>

[www.energizeinc.com/art/astaf.html](http://www.energizeinc.com/art/astaf.html)

## Tools

Sample clearance/release form

Sample reference check forms

***Ask your neighbours and local nurseries if they have had success with these plants. Will you have to give them more time/attention than you can spare?***

J 1

## Permission to Perform Background Check

I hereby allow the CAP Centre to perform a check of my background, including:

- Past employment/volunteer history
- Educational/professional status
- Personal references and other persons or sources as appropriate for the volunteer positions in which I have expressed an interest.

I understand that I do not have to agree to this check, but that refusal to do so may exclude me from consideration for the position.

I understand that information collected during this check will be limited to that appropriate to determining my suitability for a position, and that all such information will be kept confidential.

I hereby also extend my permission to those contacted to give their full and honest evaluation of my suitability for the described volunteer work.

Signed \_\_\_\_\_ Date \_\_\_\_\_

## Orientation

### ***Why?***

- Convey your values and mission
- Ensure knowledge of policies and procedures
- Clarify your expectations
- Make people feel confident with and that they understand how the centre works
- Help them understand how they contribute to the programs
- Set the tone of the work placed and help people adapt quickly

## ***What?***

Answer these questions:

### **Why should I volunteer here?**

Answer with the centre's aims, the clients, values, programs, future plans.

### **How will I be working here?**

Their contribution, the relevant policies, facilities and equipment, requirements and benefits, record-keeping, time lines, key events

### **How do I fit in here?**

Introduce the staff and volunteers, Talk about dress, customs, parking, coatroom, washrooms, breaks, sign in/out procedures etc.)

## ***When?***

Before training

Before work begins

Or divided into sections:

- before they begin work
- on their first day
- during first week
- within 6 months (certain items)

## ***How?***

Provide an orientation session and/or packet/manual/checklist

Don't just read it out

- interact, discuss

Don't assume people understand

- Clarify or define everything - their definitions of "confidential" or "appropriate" may be light years from yours

## ***Tools***

Manual contents

Agreement form

Orientation planning

Session outline

## ***Check Out***

McCurley & Lynch: *Volunteer Management*, p.63

Tremper & Kostin: *No Surprises*, p.28

[www.cybervpn.com](http://www.cybervpn.com)

[cap.ic.gc.ca](http://cap.ic.gc.ca)

[www.serviceleader.org/vv/handbook/index1.html](http://www.serviceleader.org/vv/handbook/index1.html)

[www.monashee.com/manual/vol\\_guidelines.html](http://www.monashee.com/manual/vol_guidelines.html)

[pciweb.baka.com/web/feist/newemp.htm](http://pciweb.baka.com/web/feist/newemp.htm) [www.cybervpn.com/index.htm](http://www.cybervpn.com/index.htm)

[www.serviceleader.org/vv/orient.html](http://www.serviceleader.org/vv/orient.html) [hrweb.berkeley.edu/GUIDE/Gd\\_new.htm](http://hrweb.berkeley.edu/GUIDE/Gd_new.htm)

*Don't throw seeds onto cold, unforgiving ground. Prepare them and the soil.*

## ***Suggestions for your Orientation Manual***

- The center's mission statement
- Description of the centre's program
- Goals for the future
- Organizational chart with staff names and roles
- Purpose of volunteer program
- Volunteer position descriptions
- Policies relevant to volunteers
- Organization of volunteer program (training, evaluation, etc.)
- Hints about common problems
- The Centre's expectations about behaviour (reliability, punctuality, patience, etc.)
- Forms volunteers will use
- Activities volunteers may attend
- Do's and don'ts
- Support available to volunteers (evaluations, letters of recommendation, help with difficult situations, etc.)
- Rights
  - volunteers
  - the centre
  - staff
- Responsibilities
  - volunteers
  - the centre
  - staff
- Training opportunities
- CAP centre's partners/affiliated organizations
- Contacts for volunteers Agreement form\*

*\*Instead of an agreement form, you may prefer volunteers to sign the position description (see section B).*

## ***SAMPLE***

### ***Agency/Volunteer Agreement***

This agreement is intended to indicate the seriousness with which we treat our volunteers. The intent of the agreement is to assure you both of our deep appreciation for your services and to indicate our commitment to do the very best we can to make your volunteer experience here a productive and rewarding one.

#### **I. Agency**

We, \_\_\_\_\_ (agency), agree to accept the services  
of \_\_\_\_\_ (volunteer) beginning , and we commit to the following:

To provide adequate information, training, and assistance for the volunteer to be able to meet the responsibilities of their position.

1. To ensure diligent supervisory aid to the volunteer and to provide feedback on their performance.
2. To respect the skills, dignity, and individual needs of the volunteer, and to do our best to adjust to these individual requirements.
3. To be receptive to any comments from the volunteer regarding ways in which we might mutually better accomplish our respective tasks.
4. To treat the volunteer as an equal partner with agency staff, jointly responsible for accomplishment of the agency mission.

## II. Volunteer

I, \_\_\_\_\_ , agree to serve as a volunteer and commit to the following:

1. To perform my volunteer duties to the best of my ability.
2. To adhere to agency rules and procedures, including record-keeping requirements and confidentiality of agency and client information.
3. To meet time and duty commitments, or to provide adequate notice so that alternate arrangements can be made.
4. To act at all times as a member of the team responsible for accomplishing the mission of the agency.

## III. Agreed to:

Volunteer: \_\_\_\_\_

Date: \_\_\_\_\_

Agency Representative: \_\_\_\_\_

Date: \_\_\_\_\_

*Source: McCurley & Lynch: Volunteer Management (Heritage Arts 1996) L 3*

# Planning the Orientation Session

The following may need to be considered:

## Scheduled sessions or "as needed"

The advantage to scheduled sessions is that you can welcome several volunteers at once, thus saving time. The disadvantage is that some volunteers may lose interest if they have to wait too long. You may decide to hold regular sessions at your peak recruiting times and then supplement with individual orientations when necessary.

## Group or individual

To accommodate scheduling needs, you may have to offer several different times and locations. Alternatively, you can conduct individual orientations, which are very time consuming. One-on-one orientations can be made more manageable by enlisting the help of experienced volunteers or staff members.

## Length of session

Generally, an orientation should be no longer than two hours. If all the material cannot be covered, some of it can be done in the training session.

## Format

Don't make the session a lecture. Use videos if you have them. Include discussion. Take the people on a tour of the centre. At the very least, have more than one presenter to provide variety and maintain interest. Avoid the temptation to hand out a manual and tell them to read it. This approach will shorten the session, but chances are they will overlook important information.



### **Who should be involved**

Orientation is a good time to introduce the people who work at centre. Include staff, experienced volunteers, administrators/management and clients, who can explain their roles and where they are likely to interact with the volunteers. (You should prepare all those you introduce by telling them exactly what information you expect them to offer, and by giving them a time limit for their contribution. Otherwise, there may be repetition, over-detailed explanations or inappropriate, off-the-cuff entertainment.

### **One-time or occasional volunteers**

You should offer condensed orientations one-time or occasional volunteers. Cover only the information the volunteer will need (such as forms they must use, tasks they must perform.) Have a list of frequently asked questions and the answers. Pair each volunteer with a more experienced volunteer or staff member to make sure the new recruit feels welcome and able to do the assigned task.

**Remember to back up your orientation with written materials (volunteer manual, policies, etc.)**

L4

## ***Outline for Orientation Session***

**Welcome (5 minutes)**

**Introductions (presenters and participants) (5 minutes)**

**Ice breakers (if large group) (10 minutes)**

### **Part I -- Who are We? (15 minutes)**

CAP Program Programs offered at this centre Centre aims, values, future plans

Who is involved

- staff
- volunteers
- clients

### **Part II --The Volunteer Program (20 minutes)**

Positions and the importance of their contribution

Policies and procedures\*

Facilities and equipment

Requirements

Benefits

Record keeping

Time lines

Key events that the volunteer can attend

### **BREAK (Coffee, doughnuts, juice) (15 minutes)**

### **Part III -- Housekeeping (30 minutes)**

Tour of centre

Introduction to volunteers, staff, clients not included above

Dress code

Parking

Coatroom

Where to take breaks

Washroom location

Sign in/out procedure

Phone numbers to call if unable to attend etc.

### **Questions (10 minutes)**

\* You may want to hand out the manual at this point, and refer to relevant pages.

L 5

## **Training**

### ***Why ?***

Training helps volunteers:

- Avoid mistakes
- Achieve good, satisfying work
- Enjoy feelings of belonging and status
- Know you value them enough to invest in them
- Know they are recognized

### ***How ?***

- Use interactive techniques (small groups, video, role play, case studies)
- Demonstrate skills, practice, get feedback
- Discuss
- Use peer support and mentoring

### ***When ?***

- Pre-job
- On the job Continuing

### ***What ?***

Make your training relevant to the actual work. Consider what skills, knowledge and attitudes the volunteer needs to perform the job, then refer back to their application/position description/interview to determine what they need. Assess the job for risks and cover these aspects.

Train under three sections:

- Information needed for the work
- Skills to do the work Attitudes and approaches to successfully perform the work

### ***Check out***

McCurley & Lynch: Volunteer Management, p. 63-70 Tremper & Kostin:

No Surprises, p. 28-29

[www.cybervpm.com](http://www.cybervpm.com)

[www.trainingdr.com/articles.htm](http://www.trainingdr.com/articles.htm)

[www.casanet.org/nuts/volunteer\\_management/manage.htm](http://www.casanet.org/nuts/volunteer_management/manage.htm)

[www.volunteertoday.com/train.html](http://www.volunteertoday.com/train.html)

### ***Tools***

Determining training needs

Training design worksheet  
Helpful suggestions

*Harden your seedlings off with gradual exposure -- too much, too soon and you'll lose them!*

M1

## ***Determining Training Needs -- Worksheet***

Training gives volunteers the ability to perform their jobs. It should give information, develop skills and engender attitudes. Everyone needs orientation, but some people are already trained in the skills and knowledge necessary for the job.

**For each candidate:**

1.a) List the of skills required for the position (from position description).

b) List the skills each volunteer already has (from application form, résumé, interview form).

c) List each volunteer's skills that could benefit be developed through training

2a) List the knowledge required for the position (from the position description).

3a) List the attitudes required for the position (from the position description).

b) List the attitudes each volunteer already has (from application form, résumé, interview form).

c) List the attitudes that could be developed through training.

4. Divide the attitudes into two primary areas and list possible resource person(s) to provide that training.

M2

### ***Functions***

- What to do to accomplish the job \_\_\_\_\_
- What not to do \_\_\_\_\_
- What to do if \_\_\_\_\_

### ***Roles***

- The people with whom each volunteer will work (co-workers, supervisors, etc.) \_\_\_\_\_
- Co-workers' and supervisors' roles \_\_\_\_\_
- Each volunteer's role \_\_\_\_\_

M3

## **SAMPLE**

### ***Volunteer Training Design Worksheet***

Who are the individuals and groups who need training?

What are their previous levels of involvement with this subject or with the requirements of this job?

What *information*, *experience*, and *attitudes* should they possess at the ending of the training?

A. *Information* may include knowledge of the project and the system, knowledge about the position or the recipients of the service, "how-to's" related to the position's functions or specific skills:

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B. *Experience* may include practice at being someone (acquired through role-playing or role discussion), or practice at doing something (such as constructing a plan of action or operating equipment).

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C. Attitudes may include a clear sense of purpose and direction, a sense of ability to do the work well, and the motivation to do the job correctly and according to established procedures.

In what order does the training need to be presented in order to be useful and understandable?

Source: McCurley & Lynch: Volunteer Management (Heritage Arts 1996)

M 4

## Training Planning Suggestions

What formats are available to delivery the training?

- **Independent study**

Videotape  
Books, manuals  
Magazines, newsletters

- **One-on-one assistance**

Telephone technical assistance  
Mentor/buddy system  
Assigned staff/volunteer coach  
Apprenticeship

## Training or workshops

- Lecture
- Exercise
- Role play
- Group discussion
- Case study

- Worksheet development

What format best matches each of the informational, experiential, and attitudinal needs that have been identified?

Who should be involved in designing and delivering each component of the training? Consider the desirability of "insiders" versus "neutrals," their inter-personal skills, technical knowledge and experience, credibility and ability to forge relationships.

Who else needs to be involved or informed to make this training work in the real world?

- Supervisors
- Co-workers
- Clients
- Other

M 5

## Suggestions that Might Help

As you plan training, ask yourself: When? Why? How? What? Who?

### **Pre-Job Training (formal training)**

#### **Why?**

To prepare people before they begin work

#### **How?**

Small group, lecture

#### **What?**

Orientation about the centre (clients, goals, policies and procedures)

Reading appropriate materials

Observing others doing job

Who? Staff from your centre

Other CAP volunteers committee/board members

CAP volunteer coordinator

Directors of other volunteer programs

### **On-the-job Training (coaching)**

#### **Why?**

To learn or improve skills

To perfect performance

To extend knowledge

#### **How?**

Group sessions

Workshops

Small groups

One-on-one

#### **What?**

Observation  
Demonstration  
Practice  
Feedback

**Who?**

Staff from your centre  
CAP volunteers  
CAP volunteer coordinator  
CAP technician  
Faculty from community colleges  
Outside consultants  
M 6

## ***Continuing Education (counseling)***

**Why?**

Helps people solve problems  
Improves motivation  
Aids retention  
Encourages the life long learning process

**What?**

Small group discussion  
Seminar Lecture  
Workshop  
Brainstorming sessions  
Individual study

**How?**

Staff and volunteer meetings  
Outside continuing education classes  
Trips  
Observation

**Who?**

Staff from your centre  
Your clients  
CAP volunteers  
Faculty from community colleges  
Outside consultants  
Local business people

M 7

## **Supervision**

**What?**

Supervision consists of:

- listening
- constructive feedback
- giving credit where it is due

- corrective action

### Why?

- To ensure tasks are carried out in a safe and appropriate manner and that program objectives are met
- To motivate volunteers
- To decrease risks
- To identify other areas where volunteers may contribute

### How?

- Check in (keeps track of attendance, # hours worked, work completed)
- Observe, recognize good work, express concerns
- Offer formal feedback
- Examine work for technical excellence
- Conduct spot checks if volunteers are off site
- Telephone check occasional volunteers
- Solicit client feedback (if appropriate)
- Encourage volunteers to report (self-assessment)

### Wait!

- Remind the volunteer of supervision
- Focus on people doing right, not wrong
- **Don't** - play favourites - violate trust - be inconsistent - fail to follow policies - lose your cool - engage in an inappropriate personal relationship with someone you supervise

### Tools

- Supervision models problem solving techniques
- Do's and don't's
- giving feedback
- self assessment checklist
- weekly schedule

## Check Out

Ellis, Susan J: *From the Top Down* pp. 92-95

McCurley & Lynch: *Volunteer Management* pp.71 - 104

Tremper & Kostin: *No Surprises* p.29

Volunteer Canada: *Basic Volunteer Management*

[erc.msh.org/fpmh\\_english/chp5/p3.html](http://erc.msh.org/fpmh_english/chp5/p3.html)

[www.cybervpm.com/](http://www.cybervpm.com/)

[www.casanet.org/nuts/volunteer\\_management/manage.htm](http://www.casanet.org/nuts/volunteer_management/manage.htm)

*Young seedlings need a watchful eye. Do they have what they need to survive ? Are they thriving or drooping ?*

N 1

## Supervision Models

### Who will do your supervising?

Your options include:

- Committee/board member(s) who are available to visit the centre on a frequent, regular basis. Remember, supervising volunteers in direct service is not a standard role of a board member. When they undertake it they remove their board "hat" and don a direct service "hat".
  - Volunteer Coordinator (paid or unpaid)
  - Staff who work at the centre anyway and can integrate the supervision, or some elements of it into their regular duties.
  - Volunteers who supervise each other, using a buddy/mentoring approach
  - Mixed
    - a) A combination of any of the above
    - b) A supervising team consisting of all of the above
- Assess which of these models would work best for you, by working through the following: List who has the skills and time to supervise.

Person	Skills(/)	Time (list hours per week)
Board/committee:		
Co-ordinator		
Staff:		
Volunteers:		

Whoever you decide will be responsible must use standardized methods/criteria and report using the same checkpoints. They must also be available as resource person(s) to the volunteer, to provide answers, support, guidance, feedback and information.

N2

## Problem Solving Techniques

### 1. Recognize that there is a problem

Be alert to potential problems arising if:

- There has been a decline in performance.
- A volunteer is apathetic or withdrawn.
- A volunteer is constantly complaining about trivial things.
- You have found it difficult to establish a good working relationship with a volunteer
- A volunteer is reluctant to discuss his/her job with you.
- A volunteer has continuing interpersonal problems with others at the centre.
- A volunteer resents criticism.
- A volunteer's behaviour is beginning to affect others.

### 2. Make an estimate of the situation

- Who is involved?



- What are the circumstances?
- Where and when does the problem occur?
- Why and how did the problem arise?
- Investigate, consider, ascertain facts.

### **3. Consider solutions**

- What can be done to correct the situation?
- Are there several alternatives? (If so, consider the pros and cons of each.)

### **4. Act When dealing with the volunteer:**

- Focus on the problem, not the person.
- Describe your observations and the impact of the behaviour/situation.
- Ask the volunteer for his or her opinion.
- State the centre's needs.
- Offer your help.
- Agree on the steps each of you will take.
- Set a follow-up date to review the situation with the volunteer.

## **Supervisory Do's and Don't's**

### **Do:**

- Take action promptly
- Remember that maintenance of discipline is an integral part of supervision.
- Be sure of your facts before taking action.
- Be certain that the offending volunteer knows what is causing the concern.
- Give the volunteer a chance to make amends.
- Make certain the action you take is consistent and that everyone concerned knows the reasons for the action.

### **Don't:**

- Suppose the problem can be solved by ignoring it
- Act when anyone concerned is emotional - wait until everything calms down.
- Try to reform the volunteer's personality.
- Take the easy way out by transferring them to another position without resolving the problem.
- Reprimand in front of others.

## **Giving Feedback**

Evaluation discussions should be a two-way street between you and each volunteer. Divide your meeting into three stages.

- Review the past
- Analyse the present
- Plan the future
- Don't get too bogged down with the evaluation forms.
- Use them only as a basis for discussion.
- Start with the position description -- see if it really describes what's been happening.
- Stick to basics -- skills, relationships, comparison with last evaluation.
- Listen at least as much as you talk -- you may learn as much as the volunteer about what needs to be done.

# Dealing with Problem Behaviour

If giving a reprimand, follow these guidelines

- Don't smile -- it will confuse the volunteer if you give mixed messages.
- Don't give a lot of small criticisms at one time.
- Be specific -- don't be vague -- spell out the problem.
- Let the volunteer know how you feel.
- Put it in perspective -- if everything else is great, say so.
- Don't repeat the reprimand. Cover what needs to be done and move on.

It is a good idea to practice what you plan to say before you confront your volunteer with the problem

## Supervisor's Self Assessment Checklist

Do I?	Yes	No
Feel inferior?	_____	_____
Stand up for myself?	_____	_____
Follow policies and procedures?	_____	_____
Know my volunteers as individuals?	_____	_____
Meet with them sufficiently often?	_____	_____
Support them expressing opinions?	_____	_____
Set high standards?	_____	_____
Clarify aims/objectives?	_____	_____
Delegate when necessary to reduce workload?	_____	_____
Intervene if things go wrong?	_____	_____
Reprimand when necessary?	_____	_____
Support volunteers in difficulty?	_____	_____
Make myself accessible to my volunteers?	_____	_____
Know how my volunteers feel?	_____	_____
Act to resolve conflict?	_____	_____
Use time effectively?	_____	_____
Arrange group volunteer meetings?	_____	_____
Make time for counselling?	_____	_____
Identify emerging training needs?	_____	_____
Give feedback?	_____	_____
Ensure staff are kept informed of volunteer issues?	_____	_____

<b>Do my volunteers?</b>	<b>Have sufficient authority to accomplish it</b>	<b>Know what they are supposed to accomplish</b>
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Know if they are succeeding or not?	_____	_____
Have the skills, knowledge and supports to succeed?	_____	_____
Receive regular recognition for their work?	_____	_____
Show up reliably and punctually? Maintain interest and enthusiasm? Feel challenged and motivated?	_____	_____
	_____	_____
	_____	_____
	_____	_____

N6

## Weekly Centre Volunteer Schedule

Week of \_\_\_\_\_

To \_\_\_\_\_

**Volunteer(s) Scheduled on Duty**

Time	Mon	Tues	Wed	Thurs	Fri	Sat

## On-call Back-up Volunteers

Name	Phone	On-call Back-up Volunteers

**Check One or More:**

- Schedule Will Be Posted Each Friday For Following Week \_\_\_\_\_

- Schedule Will Be Distributed by Coordinator \_\_\_\_\_
- Volunteers Are Responsible For Picking up Schedule on Friday \_\_\_\_\_
- Volunteers May Call Coordinator for Schedule Information \_\_\_\_\_

## Evaluation

Both your volunteer program and individual volunteers should be evaluated. Only volunteer evaluation is dealt with here. For program evaluation, see: Wilson, Marlene: Effective Management of Volunteer Programs, (pp, 88 -- 89).

### Why?

To:

Reinforce or make changes in performance

Minimize risk

Reduce uncertainty caused by lack of feedback.

### When?

After Probationary period, then every 6 - 12 months

A change in position

A completing specific assignment

As appropriate for each position

### How?

Use forms then meet to discuss

Use position description to identify skills

Use a scale to indicate if expectations are met, exceeded, not met

Leave space to make comments

Make suggestions about goals and improvements

For "*rules*" see:

[www.trainingdr.com/articles/perfappr.htm](http://www.trainingdr.com/articles/perfappr.htm)

### Wait !

Before your meeting ask yourself:

Did the volunteer know what had to be done?

Is the evaluation fair?

Is the evaluation based on the work (not the individual)?

Did the volunteer have tools, information and supports to do the task?

Were mistakes corrected immediately

*for volunteer self-evaluation form, see page Q4*

## Check out

Ellis, Susan J.: From the Top Down, p.158

McCurley & Lynch: Volunteer Management, p.105

Tremper & Kostin: No Surprises, p.30

Volunteer Canada: Basic Volunteer Management

Wilson, Marlene: Effective Management

[www.trainingdr.com/articles](http://www.trainingdr.com/articles). [www.serviceleader.org/vv/vvbegin.html](http://www.serviceleader.org/vv/vvbegin.html)

[www.casanet.org/nuts/volunteer\\_management/manage.htm](http://www.casanet.org/nuts/volunteer_management/manage.htm)

[www.serviceleader.org/vv/orient.html](http://www.serviceleader.org/vv/orient.html)

[www.trainingdr.com/articles.htm](http://www.trainingdr.com/articles.htm) [erc.msh.org/fpmh\\_english/chp5/p3.html](http://erc.msh.org/fpmh_english/chp5/p3.html)

# Tools

Sample evaluation form

Blank evaluation form

*Are your plants strong enough to stand alone? Are they happy where they are ? Would they do better in another part of the garden ?*

## SAMPLE

### ***Volunteer Position Evaluation Form***

Name of Volunteer: \_\_\_\_\_

Period of Evaluation: \_\_\_\_\_

Position: \_\_\_\_\_

Date of Evaluation: \_\_\_\_\_

Position Goals	Not Met	Satisfactory	Superior
1.			
2.			
3.			
4.			

Work Relationships	Excellent	Satisfactory	Need Improvement
Relations with other volunteers			
Relations with staff			
Relations with clients			
Meeting commitments on hours and task deadlines			
Initiative			
Flexibility			

Comments by supervisor regarding above areas:

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Comments by volunteer regarding above areas:

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Overall, how does the volunteer feel about remaining in this position?

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What else can be done to support the volunteer in this position or to move the volunteer to a new position?

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Signed: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

Volunteer: \_\_\_\_\_ Date: \_\_\_\_\_

Scheduled date of the next evaluation.

Community Services Council, Volunteer Centre: *Making the Most of Volunteer Res*

Volunteer: \_\_\_\_\_

Position: \_\_\_\_\_

Start date at CAP centre: \_\_\_\_\_

(in current position) \_\_\_\_\_

Evaluation period from \_\_\_\_\_ to \_\_\_\_\_

Description	Outstanding	Good	Needs Improvement
<b>A. Job Performance</b>			
1. Shows enthusiasm for work	5	4 1	3 2
2. Shows initiative	5	4 1	3 2
3. Works well with limited supervision	5	4 1	3 2
4. Assumes responsibility for own improvement	5	4 1	3 2
<b>B. Work Habits</b>			
1. Punctuality	5	4 1	3 2

2. Reliability	5 2	4 1	3
<b>C. Relations with Staff</b>			
1. Understands relationship with staff, relates appropriately	5 2	4 1	3
2. Accepts direction well	5	4 1	3 2
3. Works well as part of a team	5	4 1	3 2
<b>D. Relationship with clients</b>			
1. Is a good communicator	5	4 1	3 2
2. Maintains self-control and patience	5	4 1	3 2
3. Is comfortable with clients	5	4 1	3 2
4. Has skills necessary for clients to respect and understand instruction	5	4 1	3 2

P3

Major accomplishments of volunteer during this period \_\_\_\_\_

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Areas of weakness (if any) in performance during this period \_\_\_\_\_

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Factors contributing to performance (crisis, illness, absence etc.) \_\_\_\_\_

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Evaluator's Comments\_\_\_\_\_

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Signature\_\_\_\_\_Date\_\_\_\_\_

Volunteer's Comments\_\_\_\_\_

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Signature\_\_\_\_\_Date\_\_\_\_\_

P 4

## Motivation and Retention & Retention Orientation

### Why ?

Volunteers will stay longer if:

- Their needs are met
- You are flexible
- They feel appreciated
- They feel part of the team

### What ?

Give them:

- A great place to work
- What they don't already have
- A good time

Tools :

- Motivation Checklist
- Climate checklist
- self assessment form



## How ?

Specifically:

- Give them benefits
- Give them what they want to get (refer back to application form)
- Ensure their work is meaningful
- Evaluate often enough for them to be successful
- Encourage them to network with other CAP volunteers so they don't feel too isolated
- Give them recognition (see section S)

## Check out

Graff, Linda L: *By Definition*, p.37

McCurley & Lynch: *Volunteer Management*, pp. 107, 116--122

Vineyard & McCurley. *Managing Volunteer Diversity*, pp. 29, 38

VIVE: *Resource sheet 13*

Volunteer Canada: *Basic Volunteer Management*

Wilson, Marlene: *Effective Management* p. 118

[www.bmi.net/mba/recrui.html](http://www.bmi.net/mba/recrui.html)

[www.cybervpm.com/](http://www.cybervpm.com/)

[cap.ic.gc.ca](http://cap.ic.gc.ca)

[erc.msh.org/fpmh\\_english/ch5/p3.html](http://erc.msh.org/fpmh_english/ch5/p3.html)

[www.impactonline.org/advice/why.html](http://www.impactonline.org/advice/why.html)

.

*Go back and read your seed packets. Are you providing what they said they needed ?*

Q 1

## Motivation Checklists

### What went wrong?

- Discrepancy between their expectations and reality.
- No feeling of being appreciated.
- Too routine -- no variety.
- Lack of support.
- Little prestige.
- No chance to show initiative/creativity.
- Tension in workplace.
- Position too demanding.
- Burnout.
- External forces.\*

### What might help?

- Involve them in planning/administrative process.
- Make them feel appreciated.
- Let them see they make a difference.
- Give chance for advancement.
- Make sure they feel capable of handling the position.
- Give them a sense of belonging.

- Ensure what they are doing advances your goals and theirs.
- Make sure the job is worthwhile.
- Offer training opportunities.
- Give them a variety of tasks.

### How can we do it ?

- Show respect
- Acknowledge accomplishments.
- Give volunteers responsibility for making new recruits feel comfortable.
- Respect parameters -- don't expect more (time or skills) than they offered.
- Increase responsibility as appropriate.
- Ensure there is a supportive environment.
- Check that you have policies and procedures in place which support volunteer involvement

\*You cannot control external pressures, but you can be supportive and allow them to leave without guilt.

Q 2

## Climate Checklist

Use the following to assess the motivational climate in your CAP centre.

Environmental Factor	Satisfactory	Needs Work
Policies	_____	_____
Administration	_____	_____
Supervision	_____	_____
Working Conditions	_____	_____
Interpersonal Relations	_____	_____
Status	_____	_____
Security	_____	_____
Money	_____	_____
<b>Intrinsic Position Factor</b>	_____	_____
Achievement	_____	_____
Recognition	_____	_____
Challenge	_____	_____
Increased Responsibility	_____	_____
Growth	_____	_____

Adapted from, Frederick Herzberg: "*Hygiene Theory*" as it appears in Making the Most of Volunteer Resources, Volunteer Centre, Community Services Council, 1992.

## Motivation Self-Assessment

### A. Job Accomplishment

1. When I accepted this position, what did I hope to accomplish? \_\_\_\_\_

2. What have I accomplished? \_\_\_\_\_

3. What are my goals and priorities for the upcoming period? \_\_\_\_\_

4. How could I effectively meet the above goals? \_\_\_\_\_

5. How do I feel about the job I am doing? \_\_\_\_\_

### **B. CAP Centre**

1. What are the main satisfactions I receive working at the CAP centre? \_\_\_\_\_

2. What are the main frustrations? \_\_\_\_\_

3. How can this be improved? \_\_\_\_\_ What can I do to help this happen? \_\_\_\_\_

4. How can I help the centre meet its goals and objectives? \_\_\_\_\_

### **C. Personal**

1. How much time do I spend per month on my volunteer responsibilities? \_\_\_\_\_  
Is this too much/little? \_\_\_\_\_

2. How effectively am I using my skills and capabilities in this job? \_\_\_\_\_

3. Do I have enough responsibility and authority? \_\_\_\_\_ Too much?

4. Do I receive enough feedback on my performance? \_\_\_\_\_ What would I like?  
From \_\_\_\_\_  
whom? \_\_\_\_\_

5. What suggestions, complaints, observations do I have that will help me and the centre be more effective?

### **D. Summary: Self-Contract**

As a result of this self-assessment, I will undertake the following, in an effort to be a better volunteer, working towards the goals of the CAP centre.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## **Recognition**

## **How ?**

Recognize everyone equally without favouritism, but without compromising standards

Ask them how they would like to be recognized and act on suggestions

Provide recognition frequently and sincerely

## **Why ?**

Conveys a sense of appreciation and belonging

Shows that you value volunteer support

Encourages continued commitment

## **Formal ?**

More public (beyond supervisor)

Visibility in community

Special recognition events

Reference letters

Rewards (e.g. hour pins)

Pictures of volunteer at work

Nominations for awards

Access to training

## **Informal ?**

Day to day (say thank you)

Volunteer bulletin board

Reimburse expenses

Identity (name tag/pin)

Flexibility (suit their scheduling needs)

Correct placement

Rotating positions (promotion)

Meaningful work

## **When ?**

When they sign up (welcome card/letter)

Daily/weekly (smile/thank you/good to see you)

Monthly (volunteer of month in newsletter)

Special occasions (birthday card/anniversary of joining)

Annually (special events, awards, certificates)

When they leave (personal memento)

Upon completion of specific assignment (Relevant awards -- vary these often)

Don't forget about Volunteer Week - see [www.volunteer.ca/dev/projects/](http://www.volunteer.ca/dev/projects/)

## **Tools**

37 Specific ideas for recognition

Places to get recognition items

Check out

McCurley & Lynch: Volunteer Management, pp. 122 -- 126

Vineyard & McCurley: Managing Volunteer Diversity, p. 38, 67

Nelson, Bob: 1001 Ways to Reward Employees

[www.cybervp.com](http://www.cybervp.com)

[cap.ic.gc.ca](http://cap.ic.gc.ca)

[www.volunteertoday.com/recrui.html](http://www.volunteertoday.com/recrui.html)

[www.casanet.org/nuts/volunteer\\_management/manage.htm](http://www.casanet.org/nuts/volunteer_management/manage.htm)

*Enjoy your crop - breathe in the scent of your flowers - you've done a good job!*

R 1

## 37 Suggestions - Ways to Recognize Volunteers

1. Smile.
2. Have pizza for teen volunteers.
3. Put up a volunteer suggestions box.
4. Give gift certificates or coupons to local stores, restaurants cultural events amusements.
5. Reimburse expenses.
6. Send birthday cards.
7. Send letters of appreciation to families, employers, schools.
8. Plan an awards and recognition ceremony.
9. Invite volunteers to staff meetings.
10. Be pleasant.
11. Provide babysitters or a nursery.
12. Accommodate personal needs and problems.
13. Advertise volunteers' businesses in your newsletter.
14. Allocate a special parking spot for a month.
15. Have a family night at the centre to thank families for the time they've sacrificed.
16. Donate to a charity of volunteers' choice.
17. Say good morning, good afternoon, good night.
18. Greet people by name.
19. Send newsworthy information to the media.
20. Have wine and cheese parties.
21. Create a yearbook of volunteers.
22. Welcome volunteers to staff coffee or lunch breaks.
23. Enlist volunteers to train new volunteers.
24. Have a public reception.
25. Take time to talk and listen.
26. Give volunteers fees for education or self-help programs.
27. Defend your volunteers against hostile or negative staff.
28. Send Valentines.
29. Recommend volunteers to future employers.
30. Invite input into policies and plans.
31. Surprise people with coffee and cake.
32. Nominate your volunteers for volunteer awards.
33. Plan staff and volunteer events.
34. Promote a volunteer-of-the-month program.
35. Say "we missed you" after vacation or illness.
36. Send Christmas cards.
37. Have a picnic.

R 2

## Places to Get Recognition Items

### Local Businesses

Approach them for "freebies" such as:

- Coupons
- Vouchers
- Free passes
- Promotional items
- Meals
- Newspaper space, etc.

## Local Suppliers

**Research prices for items such as:**

- Pins
- Buttons
- Certificates
- Caps
- T-Shirts, etc.

### **Exhibitions, Trade Shows, Career Fairs, Etc.**

Frequently a good source for small give-aways

### **Local Volunteer Centre**

Probably your best source by far for ideas, suppliers and items

#### **Contact:**

Volunteer Canada - 1-800-670-0401

R 3

# Record-keeping

## Why ?

**Records can be useful for:**

- Evaluations
- Fundraising statistics
- Risk management
- Needs assessments
- Planning for next year Budgeting
- Proposal development

## What ? Number of volunteers

- Number of clients served by volunteers
- Number hours volunteer work
- Activities of volunteers
- Information on volunteers
- Impact on program
- Dollar value of volunteer hours
- Volunteer database

## Wait !

- Make certain your records have a practical purpose
- Maintain secure storage for confidential records

## Where ?

### Volunteer Files:

- Personnel information
- Application
- Interview form
- Agreement
- Training record
- Time sheet
- Log
- Evaluation forms
- Exit questionnaire
- Discharge form

## Check Out

[www.monashee.com/manual/nightly\\_report.html](http://www.monashee.com/manual/nightly_report.html)

<http://www.energizeinc.com>

<http://www.coyotecom.com/database/dbprinc.html>

## Tools

Volunteer personnel record

Volunteer information

Form

Volunteer log

Volunteer time sheet

Exit questionnaire policy on confidential storage

*Make a note of what grew well where -- next year you will learn from your mistakes.*

## Volunteer Personnel Record Form

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone (Home) \_\_\_\_\_ (Work) \_\_\_\_\_

E-mail \_\_\_\_\_

In case of emergency, notify \_\_\_\_\_

Telephone: \_\_\_\_\_

Health or physical information: \_\_\_\_\_

Period volunteer worked at CAP Centre

from \_\_\_\_\_ to \_\_\_\_\_

Positions volunteer held: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

S 2

## Volunteer Information Form

Name: \_\_\_\_\_

Interviewed : \_\_\_\_\_

### Reference Check:

Name \_\_\_\_\_ Date \_\_\_\_\_ Results \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Police Record Check

Requested \_\_\_\_\_

Received \_\_\_\_\_

### Training/Orientation

Session \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Evaluations

1st. \_\_\_\_\_

2nd. \_\_\_\_\_

3rd. \_\_\_\_\_

### Other

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

S3

## Cap Centre Volunteer Log

Month \_\_\_\_\_ Year \_\_\_\_\_

### Volunteer Time Sheet

Volunteer \_\_\_\_\_ Month \_\_\_\_\_



Day	Assignment	Hours
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		
21.		
22.		
23.		
24.		
25.		
26.		
27.		
28.		
29.		
30.		
31.		
		<b>Total Hours for Month</b>

## Exit Questionnaire

We are always trying to improve our volunteer involvement programs. We would appreciate your help in identifying areas in which we might do better. Please be as honest as you can - all information will be kept confidential, but it will be used to make sure that others who volunteer will receive the best possible treatment.

1. **How long did you volunteer with us?** \_\_\_\_\_  
**What type of volunteer work did you do?** \_\_\_\_\_

2. **Why are you leaving? (please check all that apply)**

Job completed \_\_\_\_\_

Moving away \_\_\_\_\_

Need a change \_\_\_\_\_

Didn't like job that I was given \_\_\_\_\_

Didn't feel welcome \_\_\_\_\_

Didn't feel well utilized \_\_\_\_\_

Other time commitments \_\_\_\_\_

Other \_\_\_\_\_

What did you like best about volunteering with us? \_\_\_\_\_

3. What suggestions would you make to improve our volunteer program?

4. Overall, how would you rate your experience in volunteering with us?

Great \_\_\_\_\_ 5 \_\_\_\_\_ 4 \_\_\_\_\_ Average \_\_\_\_\_ 3 \_\_\_\_\_ 2 \_\_\_\_\_ Terrible \_\_\_\_\_ 1 \_\_\_\_\_

**Thank you for completing this form. We appreciate your help in volunteering for us and for assisting our clients and the community.**

Source - *Making the Most of Volunteer Resources, Community Services Council Volunteer Centre 1992. S 6*

## Confidential Information Storage

Breaches of privacy and/or loss of records commonly result from carelessness; such as files left out on a desk or loud conversations. Physical security, such as locked filing cabinets and computer passwords, protects against prying.

As you decide your procedures, consider the following:

- Are your computer systems backed up each day?
- Where do you store the back-ups?
- Even if they are in a fireproof container, heat can ruin discs.

Remember also, that while limiting access to records is generally a good idea, it must be reconciled with the rights individuals may have to see information about themselves.

Clear rules provide essential guidelines. Below is a suggested policy for you to adapt for your own use.

## Policy: Maintenance and Storage of Records

A system of records will be maintained on each volunteer, including dates of service, positions held, duties performed, evaluation of work, awards received and other pertinent information.

Volunteer records shall be accorded the same confidentiality as staff personnel records and assigned appropriate safe storage.

S 7

## Problems ?

### What ?

- Volunteer/staff relations
- Unreliability
- Lack of interest
- Lack of skills
- Doing too much

### Why ?

#### The volunteer:

- Didn't understand what was expected
- Doesn't like the job
- Doesn't like co-workers
- Doesn't have timeFirst, talk to your volunteers

### How do we deal with this ?

#### If not try:

- More supervision
- Retraining
- Reassignment
- Termination -maintain secure storage for confidential records

## Tools :

- Problem solving guide
- Advice on termination
- Blank discharge form
- Troubleshooting

## Check out

Ellis, Susan J.: *From the Top Down*, p. 73 - 85

McCurley & Lynch: *Volunteer Management* p. 106, 131

[www.cybervp.com](http://www.cybervp.com)

*Are some plants getting crowded out, or overshadowed ? Are some plants running wild and taking over the entire garden ?  
Do some judicious pruning, relocating or uprooting.*

T 1

## Dealing with Problems

**Handle problems promptly.** Avoid or ignoring difficult situations usually makes the problem greater in the end. The longer we tolerate things, the harder it is to change them.

### **Wait until you are calm**

Be sure you have settled down and thought about what you want to accomplish before you act.

### **Give feedback on a one to one basis**

It is better to discuss negative issues in private.

### **Describe what you have observed**

Give an example of what you have seen rather than your own interpretation.

**Use the position description to identify expected behaviour.** This helps to separate the person from the function or role.

**Share how you feel when the difficulty arises.** Maybe the person just doesn't realize how that behaviour affects others.

### **Try to develop a mutual solution**

Focus on a shared decision.

### **Arrange for follow-up**

Keep your door open - check that you have both understood the problem and agreed on the solution.

## Advice on Termination

- Make sure your supervision and evaluation are in place.
- Make sure you have given detailed warning(s) to the volunteer (preferably in writing).
- Establish a procedure and follow it.
- Meet in private.
- Be quick, direct, absolute.
- Announce don't argue.
- Don't attempt to counsel.
- Follow-up with a letter reiterating your decision .
- Keep all relevant documents (evaluations, reports, letters, warnings, etc.) in volunteer's file.

### **For further information and help, see:**

Tremper & Kostin: *No Surprises*, pp. 30 - 32

McCurley & Lynch: *Volunteer Management* pp. 112 - 114

## Volunteer Discharge Record

Name of volunteer: \_\_\_\_\_

Position of volunteer: \_\_\_\_\_

Name of supervisor: \_\_\_\_\_

1. Nature of difficulty regarding volunteer (check all that apply):

- Providing false or misleading information on application
- Absenteeism
- Tardiness

- Insubordination
- Physically or mentally unable to work
- Failure to follow agency policies and procedures
- Intoxication or drug use
- Inability to work with staff, clients or other volunteers
- Failure to meet job performance standards
- Breach of confidentiality
- Other

2. Explain and give examples of behavior in areas checked above:

3. Give dates and nature of relevant warnings and attempts to get volunteer to correct behavior:

4. Date volunteer was discharged:

5. Person conducting discharge session:

6. Written notice of discharge of volunteer provided to:

Volunteer \_\_\_\_\_

Appropriate Staff \_\_\_\_\_

Appropriate clients \_\_\_\_\_

Other \_\_\_\_\_

Please attach copies of appropriate records and materials related to discharge.

Source: McCurley & Lynch: *Volunteer Management (Heritage Arts 1996)*

## Troubleshooting

Problem	Cause/Solution	See Section
Unreliability Lack of responsibility	<p>Be sure your position descriptions make your expectations clear</p> <p>Don't give too much responsibility too soon.</p> <p>In orientation and training, emphasize the importance of their position .</p> <p>Double-book two unreliable people in the hope that one shows up*</p>	<p>B Q</p> <p>MN</p> <p>R T</p>

Lack of confidence Lack of technical skills	Be sure your training covered all the skills they need.	
	Use your supervision/support to reassure them	S N
	Retrain Give lots of informal recognition	P R
	Use evaluation sessions to find out their specific concerns.	Q
	Hold occasional peer support groups.	
Failure to maintain confidentiality Lack of ethics Conflict of interest Improper use of facilities	Do you have policies in place?	
	Make sure you have gone over the policies at orientation.	DM P N U
	Have a consistent procedure for dealing with such problems (two warnings, then immediate dismissal - include this in orientation and training	
Lack of motivation/interest Volunteers don't stay long High turnover rate Burnout Volunteers get blasé	Were you careful with the placement?	
	Are they getting what they need?	
	Involve them in planning/decisions.	
	Try job rotation after six months.	HN
	Offer training opportunities.	M R P S Q U
	Do they get relevant benefits?	
	Give more responsibility.	
	Do you give sincere recognition?	
	Do they lack confidence? (See above)	

\* Not recommended as a permanent solution

Conflict with staff Not a good team member	Stress the importance of working together at orientation.	
	Do you have a policy about staff/volunteer relations - do they all (staff included) know about it?	MB DT L J
	Was the position description clear about who they would be working with?	
	Did your letter of acceptance state who their supervisor would be?	

Refusal to get police check	<p>Do you have a policy about this?</p> <p>Did you explain the reasons at their interview ?</p> <p>Make sure you are consistent in your requirements - be clear which positions need this check and apply it to every candidate</p>	D J K
<p>Lack of basic pr skills</p> <p>Lack of interpersonal skills</p>	<p>Is there a policy which may cover this?</p> <p>Are other staff/volunteers setting a good example?</p> <p>Was the "customer relations" aspect covered in orientation/training?</p>	D M N P
<p>Volunteers taking on too much</p> <p>Over-confidence</p>	<p>Have good clear position descriptions outlining parameters and responsibilities.</p> <p>Offer a "promotion" and have them reassign their previous work-load.</p> <p>Get them involved in recruitment and/or coordination, instead of current position</p>	B N F Q p

## Resources

### Online Resources(Canadian sites listed first)

[cap.ic.gc.ca](http://cap.ic.gc.ca)

national CAP site; changes frequently; sometimes includes information on running a CAP site

[www.voe-reb.org](http://www.voe-reb.org)

online volunteer matching service

[www.volunteertoday.com](http://www.volunteertoday.com)

recruiting, retention, training, question and answer page

[www.monashee.com/manual](http://www.monashee.com/manual)

Website for Lumby BC CAP Centre

[www.charityvillage.com/charityvillage/research/rvol16.html](http://www.charityvillage.com/charityvillage/research/rvol16.html)

risk management; liability; fund-raising; recruitment; management

[www.volunteer.ca/dev/](http://www.volunteer.ca/dev/)

Volunteer Canada's site; screening; volunteer centres; resources orientation

[edis.ifasufi.edu/BODY-HE104](http://edis.ifasufi.edu/BODY-HE104)

general management issues

[www.fiu.edu/\\_time4chg/library/recruit.keep.html](http://www.fiu.edu/_time4chg/library/recruit.keep.html)

recruitment

[www.cybervpn.com](http://www.cybervpn.com) planning; recruitment; screening; training; supervision; recognition; evaluation; diversity; staff relations

[bigjohn.bmi.net/mba/recrui.html](http://bigjohn.bmi.net/mba/recrui.html)

recruitment

[www.cybervpn.com](http://www.cybervpn.com)

all aspects of virtual volunteering

[www.txserve.org/mgmt/volrec/](http://www.txserve.org/mgmt/volrec/) recruitment ; position descriptions

[vmcp.wsu.edu](http://vmcp.wsu.edu) Volunteer Management Certificate Program [www.ci.sat.tx.us/planning/handbook/vanilla.htm](http://www.ci.sat.tx.us/planning/handbook/vanilla.htm) dealing with volunteers disabilities [www.trainingdr.com/articles.htm](http://www.trainingdr.com/articles.htm) training;evaluation [erc.msh.org/fpmh\\_english/chp5/p3.html](http://erc.msh.org/fpmh_english/chp5/p3.html) motivation; feedback; supervision [www.impactonline.org/](http://www.impactonline.org/) virtual volunteering; matching [www.energizeinc.com/](http://www.energizeinc.com/) covers all aspects of volunteer management in article format [www.coyotecom.com/database/dbprinc.html](http://www.coyotecom.com/database/dbprinc.html) advice on database issues

## v

[www.ptialaska.net/jdewitt/vlh/Risk/VLHRiskMgt.html](http://www.ptialaska.net/jdewitt/vlh/Risk/VLHRiskMgt.html)

risk management issues

[www.tenet.edu/volunteer/samples/market.html](http://www.tenet.edu/volunteer/samples/market.html)

recruitment

[www.bmi.net/mba/recrui.html](http://www.bmi.net/mba/recrui.html)

recruitment

[www.nonprofit-info.org/](http://www.nonprofit-info.org/)

non-profit management and issues

[www.casanet.org/nuts.volunteer-management/manage.htm](http://www.casanet.org/nuts.volunteer-management/manage.htm)

sometimes works with this URL - other times use [www.casanet.org](http://www.casanet.org) and follow the "Nuts and Bolts" for recent articles on volunteer management >

[hrweb.berkeley.edu/GUIDE/Gd-new.htm](http://hrweb.berkeley.edu/GUIDE/Gd-new.htm)

human resource management

Note: The content of these sites changes frequently.

\* Sources from which forms were reproduced with permission.

## Book Resources

Book Resources Carnegie, Dale: Managing through People (Simon & Schuster 1978)

Cawood, Diane: Assertiveness for Managers (Self Counsel Press 1992)

\* Ellis, Susan J.: From the Top Down (EnergizeInc. 1996)

Goosney, Murphy, Rideout & Vaughn: Open Books, Open Futures (Community Services Council, Volunteer Centre, 1995)

Government of Canada: CAP Cybercamp Handbook

Graff, Linda L.: By Definition (Volunteer Ontario 1993)

Grensing, Lin: Developing a Personnel Manual (Self Counsel Press, 1993)

Grensing, Lin: Employee Selection (Self Counsel Press, 1986)

Grensing, Lin: Motivating Today's Work Force (Self Counsel Press, 1991 Volunteer Centre: Homework Havens Manual (Community Services Council, 1996)

Imundo, Louis & Eisert, Martin: Managing Your Human Resources (AMACOM 1982)

\*Volunteer Centre: Making the Most of Volunteer Resources (Community Services Council, 1992) \*McCurley & Lynch: Volunteer Management (Heritage Arts 1996)

McCurley & Vineyard: 101 Ideas for Volunteer Programs (Heritage Arts)

Murphy, Sandra: VIVE - Volunteers Involving Volunteers Effectively (Volunteer Canada 1998) Smith, Ross E.: Successful People Management (MacMillan 1978)

Street, Lorraine: Screening Handbook - National Education Campaign on Screening Volunteers and Staff (Volunteer Canada)

Tremper & Kostin: No Surprises (Nonprofit Risk Management Centre 1993)

Vineyard, Sue: Finding Your Way through the Maze of Volunteer Management (Heritage Arts 1981)

Vineyard & McCurley: Managing Volunteer Diversity (Heritage Arts 1981)

Volunteer Canada: Basic Volunteer Management

Wilson, Marlene: Effective Management of Volunteer Programs (Volunteer Management Associates 1976)

## Other Resources



Key Form Designer 4.0 (disc) (Microsoft 1996)

Employee Selection (forms and disc) (Self-Counsel Press) Performance Appraisal (forms and disc) (Self-Counsel Press)

Ready to Use Business Forms (Self-Counsel Press 1997)

\* Denotes resources from which forms were reproduced, with permission

## **Don't Forget!**

Approach your local volunteer centre/bureau. They may be able to help you with resources, training, workshops and volunteers. For their location, call Volunteer Canada (1-800-670-0401).

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## **Success Stories**

Are you feeling totally overwhelmed by what you've read? Think you'll never be able to manage all that as well as what you're doing now?

Check out some of these web sites. They include a few of the many success stories from across the country. They are from communities like yours, that have no more resources than you, so let them inspire you! And don't forget: the one thing that may bring you success is a flourishing, thriving volunteer garden!

***Good luck! Happy cultivating!***

[cap.ic.gc.ca/cp/english/4000.htm](http://cap.ic.gc.ca/cp/english/4000.htm) links to all CAP sites in every province

[www.ingenius.bc.ca](http://www.ingenius.bc.ca) one volunteer's success (Inge van Oostveen, BC) [www.connect.gc.ca/en/1240-e.htm](http://www.connect.gc.ca/en/1240-e.htm) download the Government of Canada publication "Live from Atlantic Canada"

[info.ic.gc.ca/success](http://info.ic.gc.ca/success) Industry Canada's site

[www.labradorit.nf.ca/smartlabrador/vision.html](http://www.labradorit.nf.ca/smartlabrador/vision.html)

a successful financial effort (Sheila Downer, Labrador)

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